

Addendum No. 1 to RFP 15-95



CITY OF SOMERVILLE, MASSACHUSETTS
Department of Purchasing
JOSEPH A. CURTATONE
MAYOR

To: Prospective Bidders RFP 15-95
Customer Relationship Management (CRM), Software.

From: Orazio DeLuca, Procurement Manager

Date: April 22, 2015

Re: Bid Specifications Questions & Answers; Clarifications

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The City is issuing this addendum to RFP 15-95, Customer Relationship Management (CRM) Software, to provide answers to questions:

Please acknowledge receipt of this Addendum by signing below and including this form in your proposal package. Failure to do so may subject the proposer to disqualification.

X

Name of Authorized Signatory
Title of Authorized Signatory

1. Reminder of Due Date:

- **Proposals are due 4/27/15 at 11AM EST.**

2. Questions and Answers:

Q: I have a question concerning the RFP 15-95 for the 311 Customer Relationship Management software. I noticed on page 7 there is a bullet for meeting the fiscal deadline of 7/1/2015 for full implementation, but the contract term length will be to 5/14/2016 with the two, one year options to renew. Could you elaborate further on the 7/1/2015 deadline? Would this include full setup, migration, and training on the system?

A. We are looking for set up, migration and training of the core system and essential staff within that 6-week window. Essential staff is comprised of all 3-1-1 call takers (15), as well as the DPW (3) and T&P clerks (5). We will have all existing CRM system data (service requests, workflow, customer profiles, etc.) ready to deliver on day 1 of the awarded contract.

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Q: To provide vendors with sufficient time to develop comprehensive proposals and incorporate the City's responses to vendor questions, would the City consider granting a one week extension to the RFP deadline of April 27?

A. *No.*

Q: Is there a set budget for this project?

A. *No.*

Ref: Section 2, Paragraph 2.3

Q: What is the brand and manufacturer of the existing City CRM solution that the existing data will need to be migrated from into the new 311 CRM system?

A. *The vendor is Computer Intelligence Associates Corporation, their product is "Intelligov."*

Ref: Section 2, Paragraph 2.3, 3rd paragraph "The CRM solution must work within the context of the current telecommunication technology...leverage existing Call Center "

Q: What is the brand and manufacturer name of the current telecommunication technology in use? What is the brand and manufacturer of the existing Call Center in use?

A. *We are currently using Cisco IP phones, mostly models 7960, 7962 and 7965. We are on version 8.x software, but anticipate an upgrade to version 10.x*

Ref: Section 2, Paragraph 2.2, 4th paragraph "The maintenance agreement will not commence until the application has been placed in production and accepted by the City in writing."

Q: What does the City consider a reasonable Acceptance period (i.e., two weeks, 30 days, etc.)?

A. *60 days*

Ref: Section 2, Paragraph 2.1, 4th Paragraph "The Office of Constituent Service handles approximately 90-100K residential, commercial and inter-departmental requests..."

Q: Are the 90-100K requests per year or per month?

A. *Annually*

Ref: Section 2, Paragraph 2.7 "all services, delivery and other required support shall be conducted in the City of Somerville. Meetings between the Vendor and City personnel shall be held at the City of Somerville, Massachusetts."

Q: We understand that there will be several on-site meetings and data discovery tasks that can only be accomplished on-site within the City of Somerville offices. As you can imagine, some of the programming and other system development can be done remotely to compress deployment time and to reduce total project costs. Can some of the 311 system development be done at our office location in Indianapolis, Indiana or does the entire project from start to finish require a dedicated team on-site within the City buildings of Somerville?

A. *Yes. We would allow for remote work assuming a representative would be available onsite for discovery, training, and initial deployment.*

Ref: Section 2, Paragraph 2.3 "Meeting our fiscal deadline of 7/1/2015 for full implementation."

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Q: Is 7/1/2015 the date that the City of Somerville expects the new 311 system to be operational or is this a “key driver” for allocating the money for this project from a city financial perspective? Section 2, Paragraph 2.6 shows a period of performance starting May 15, 2015 and ending on or about May 14, 2016. Is May 14, 2016 the desired cutover date of the new 311 System?

A. *The City of Somerville expects the core elements of new 311 system to be operational by 7/1/15 as this is the end date for our current system.*

Q: Does the City of Somerville anticipate the need for the new 311 CRM system to accept credit card payments and to log credit card information which would require PCI Compliance? The Payment Card Industry Data Security Standard is a set of requirements designed to ensure that all companies process, store, and/or transmit credit card information to maintain a secure environment.

A. *No. Our CRM is separate from our online payment systems*

Ref: Section 2, Paragraph 2.4 “Integration Functionality”

Q: Could the City of Somerville please let us know what GIS system/software they are currently using?

A. *Currently running ArcGIS Desktop 10.2.2. Within the next 2 years we should also be running ArcGIS Server*

Ref: Section 4.0 “Price Form”

Q: We are trying to fully understand how to price the new 311 solution into the 5 Tasks outlined on the Price Form. Could the City please elaborate on a few items so that we may get a better idea on how to break out our pricing?

1. What is “Evaluate Rate Structure” as listed in Task 3?

A. *Fees, specifically how user licenses are structured*

2. Could you please provide a sample or definition of the data deliverable(s) you are looking for with the “Look Ahead” as listed in Task 4?

A. *Unfortunately, no samples or definitions are available.*

3. Could you please further define your expectation on “Model Development” as listed in Task 5?

A. *Unfortunately, no other defined expectations are available.*

4. Would it make sense to add a Task that is priced for the final system cutover and acceptance?

A. *Not at this time*

5. Would it make sense to add a Task that is priced to reflect the annual maintenance?

A. *Not at this time*

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6. Do you envision all the functionality listed in the Technical Requirements to be completed all at once or do you plan on phasing in some users and/or functionality over the 3-year period of performance?

A. *Phased assuming core system is functioning as of July 1st.*

7. Where would the City suggest that we put the software license subscriptions for all the users in this pricing form?

A. *As an attachment to the response would be fine.*

8. What information does the City want in the “Time to Complete” section. Is it hours or dates?

A. *Dates*

Ref: Technical Requirements 2.58 “API 3rd Party software Citizenserve, MUNIS”

Q: Can the City of Somerville confirm if MUNIS is being used as an ERP Solution?

A. *Yes*

Q: Can the City of Somerville provide any details on which Modules of Citizenserve and MUNIS they will require integrated with the new 311 CRM solution?

A. *Currently, the Citizenserve Permits and Inspections is a requirement with others TBD.*

Q: Will all the prospective bidders’ questions and answers be shared prior to the bid due date?

A. *Yes, there will be an addendum*

Q: Would the City of Somerville consider a five (5) business day extension of the bid due date considering Questions are due only six (6) business days before the bid response are due?

A. *No.*

Q: The RFP lists the required contents in several different places (e.g., Section 5.1; the proposer’s checklist; Proposal Information Requirements on p. 22; and Section 6.2 and 6.3). The requested contents don’t always align in these different sections. To help ensure the City receives a complete, responsive submission, could the City clarify all of the required contents **and** the sequence in which they should appear in the proposal package?

A. *The proposer’s checklist is a list of forms that must be submitted in the non-price and price proposals. These forms do not represent all of the contents of each sealed proposal; rather, they only represent the required forms. The additional required contents of the non-price and price proposals can be found in sections 6.2 and 6.3, respectively. A complete set of non-price and price proposals will consist of the various contents of sections 5.1 and 6.2 - 6.3.*

Q: Is the City’s GIS system Esri and will the City make a service available to the CRM system for address validations?

A. *Currently running ArcGIS Desktop 10.2.2. Within the next 2 years we should also be running ArcGIS Server*

Q: Item 2.12 in the Technical Requirements sections states: Provides ability for multiple descriptions to be used for the same location and can be verified against the city's GIS data. Please clarify what is meant by “multiple descriptions” for the same location. Does this mean that

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a location can be referenced by multiple names such as an intersection; “First and Main”, “Main and First”, “First & Main”, “Mail & First” which are all different descriptions of the same location?

A. **Yes**

Q: Would the City of Somerville consider a brief two week extension of the RFP Response due date?

A. **No.**

Q: Has the City received demonstrations of other 311 systems? If so, is the city willing to share which systems the city has seen demonstrations of?

A. ***No demonstrations have been done in the past month***

Q: What is the budget for this project?

A. **There is no set budget for this project.**

Q: Does the City have funding for this project?

A. **Yes**

Q: The City references in the RFP that “thousands of additional requests for information and services through our walk-up kiosks, email, social media, and mobile apps”. What categories do these “additional requests” fall in?

A. ***They are the same type of requests we receive through the call center, just different channels***

Q: Please describe the types of services that are handled on the walk-up kiosks?

A. ***Basic city info calls or requests for city services***

Q: Does the City desire for the vendor to replace the walk-up kiosks or integrate the existing kiosk and kiosk software to the CRM system?

A. ***The “kiosk” is not automated. It is staffed by the 311 employee who needs the same access other call takers would when handling a 311 call.***

Q: If the City desires the vendor to replace the walk-up kiosks, please state the number of kiosks that are desired for this project.

A. **N/A**

Q: Does the City envision FAQs as being a type of knowledge base article using an FAQ template?

A. **Yes**

Q: What are the requirements pertaining the “Ability to integrate the City’s GIS data”?

A. ***Currently running ArcGIS Desktop 10.2.2. Within the next 2 years we should also be running ArcGIS Server***

Q: Please explain how the City envisions that a customer satisfaction survey would occur over the phone and how the city envisions the results would be stored in the CRM system.

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A. Random samples pulled at scheduled times. Storage is wide open for discussion of options

Q: Does the City want the vendor to host the telephone survey system or does the City want to host the telephone survey system in house?

A. In house

Q: With respect to requirement 2.06, beyond the population of telephone number, what other data elements does the City expect to auto populate from “previous” requests?

A. Name, profile address, info on past work orders

Q: Can the City please clarify requirement 2.12, specifically providing examples of “multiple descriptions” and what level of validation would be performed against the GIS data?

A. “93 Highland Ave is also able to be found by searching for “City Hall”

Q: Please explain the requirements for “structured inbound e-mails”. An example of this would be helpful.

A. No example is available, but a template for web users to submit requests who do not make submittals through the CRM portal.

Q: What languages other than English are mandatory for the public web site? What languages are desired?

A. The public website will be available in English, Spanish, Portuguese and Haitian Creole

Q: Can the City please clarify requirement 4.03? An example of “limitless web links” would be very helpful.

A. Any FAQ or other city webpage that would provide useful data to be linked

Q: Re: Req 4.15 Will the City collect payments for online reservations? If so, does the City have an existing merchant provider?

A. No

Q: Will the City perform the integration to the telephone system for CTI or does the City expect the vendor to develop the integration component to the telephone system?

A. The city will not provide integration

Q: How does the City envision integrating TTY into the CRM and online request system?

A. We use a separate TTY system for calls to 311

Q: What platform is the 311 system currently on?

A. Intelligov

Q: Is your system currently enabled with a CRM system today?

A. Yes

Q: If so, what system is it?

A. Intelligov

Q: If not, what are your expectations for the system’s functionality?

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A. N/A

Q: What is the phone system that the city currently utilizes? Please provide both manufacturer and model.

A. Cisco, 7960, 7962, 7965

Q: Is the city considering changing phone vendors, which we need to be aware of for immigration purposes?

A. No

Q: What is the specific functionality you need for:

a. Outbound (simple click to dial – or anything else?)

A. Simple

b. Inbound (pop record if one exists, pull from other public databases to grab the caller ID's name and number, what happens if there is no matching phone number, etc.)

A. Pull from old DB or create new profile if needed

Q: Can you provide any statistics on other sources of requests?

A. No

Q: What social media apps are you using?

A. Facebook and Twitter

Q: Does the solution need to be multilingual?

A. Not needed, but it would be a plus

Q: Do you have a technical data schema on your existing 311 solution to help us better understand the data migration requirements, since you are requesting "that all existing 311 data be migrated"? What does "all" mean?

A. All data will be in a simple Excel format.

Q: Why is the City looking to move off of its current system?

A. We are looking for the best system that fits our budget. The currently system may, or may not be it.

Q: What is the approximate budget for this solution?

A. See above.

Q: In the overview section of the specifications in 2.3, you say "detailed workflow for each service type contained within the system". With that being said, how many different service types are you expecting to have for which you are requesting programmable workflow?

A. 50

Q: In the specifications overview 2.3, you are requesting "improved querying and reporting capabilities". Do you have sample reports for what you are looking to generate out of the CRM application?

A. No samples are available

Q: Is there any flexibility in the July 1, 2015 deadline for full implementation? Based upon this date and the services start date, this is a 6 week project which may be difficult to complete.

A. No.

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Q: What is the city's current GIS system?

A. *See above.*

Q: What are the specific other city applications that are required for integration? And more specifically, what are the integration touchpoint requirements?

A. *Citizenserve, future systems TBD*

Q: Please clarify the required proposal format. The Proposal Information Requirements on page 22, the Proposal Evaluation Criteria on page 18, and the Non-Price Proposal Format starting on page 45 do not match.

A. *The instructions in section 6.0 are more format-specific, while the instructions in the "Proposal Information Requirement" section are more content-specific. Otherwise, please be advised to follow all of the RFP's instructions.*